Alma Marie Koontz (Estate)
Helding, Neil A. (for Richard Koontz – Executor/Petitioner)
Report of Status of Administration

DOD: 11/30/12		RICHARD W. KOONTZ, son, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Politioner was appointed Evecutor with	CONTINUED EDOM 04/19/14
		<b>Petitioner</b> was appointed Executor with full IAEA and without bond on 02/14/13.	CONTINUED FROM 04/18/14
		Letters Testamentary were issued on	OFF CALENDAR
Со	nt. from 041814	02/21/13.	First and Final Account and
	Aff.Sub.Wit.		
✓	Verified	Petitioner states:	Petition for Distribution
	Inventory	1. Notice to Creditors was made and no	
	PTC	creditor's claims have been filed.  2. The Final Inventory & Appraisal was	hearing on 08/13/14
	Not.Cred.	filed on 05/03/13.	
✓	Notice of	3. Estate tax returns have been filed for	
	Hrg	2012 and will be filed for 2013. Any	
✓	Aff.Mail W		
	Aff.Pub.	be promptly paid.	
	Sp.Ntc.	4. The estate is about ready to be closed. There is a matter involving	
	Pers.Serv.	the Franklin-Templeton assets and	
	Conf.	Petitioner has been in	
	Screen	correspondence with that company.	
	Letters	5. There has been a discussion	
	Duties/Supp	regarding a waiver of accounting,	
	Objections	however, one of the heirs does not agree to waive an accounting,	
	Video	therefore a formal accounting will	
	Receipt	need to be prepared.	
	CI Report	6. Jill Spaulding has been contacted to	
	9202	prepare the accounting, but she is	
✓	Order	unavailable currently due to health	
	Aff. Posting	issues and stated that she would not	Reviewed by: JF
	Status Rpt	be able to prepare the accounting before the 04/18/14 status hearing.	<b>Reviewed on:</b> 07/09/14
	UCCJEA		<b>Updates:</b> 07/10/14
	Citation	Petitioner requests:	Recommendation:
	FTB Notice	That the Court grant an extension	File 1A – Koontz
		of time so that the accounting,	
		report and Petition to distribute	
		the estate can be prepared and filed on or before 07/15/14.	
		11100 011 01 001010 07710714.	
		Corrected Inventory & Appraisal filed	
		07/02/14 - \$650,435.72	
			1Δ

Alma Marie Koontz (Estate)

Helding, Neil A. (for Richard W. Koontz – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

-	sidius nearing ke. Filing of the First Accou	
DOD: 11/30/12	RICHARD W. KOONTZ, son, was	NEEDS/PROBLEMS/COMMENTS:
	appointed Executor with full IAEA and	
	without bond on 02/14/13. Letters	CONTINUED FROM 04/18/14
	Testamentary were issued on 02/21/13.	
Cont. from 041814		1. Need First/Final
	Inventory & Appraisal, final filed	Account/Report of Executor
Aff.Sub.Wit.	05/03/13 - \$596,843.83	and Petition for Distribution.
Verified	Corrected Inventory & Appraisal, filed	OFF CALENDAR
Inventory	07/05/14 - \$650,435.72	OFF CALENDAR
PTC	ψ030,403.72	First and Final Account and
Not.Cred.		Petition for Distribution
Notice of	]	Filed 07/09/14 and set for
Hrg		hearing on 08/13/14
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		<b>Reviewed on:</b> 07/09/14
UCCJEA		<b>Updates:</b> 07/10/14
Citation		Recommendation:
FTB Notice	<u> </u>	File 1B – Koontz
<u> </u>		1 D

Jamie E. McGlashan (CONS/PE)

Howk, Robert L (for Craig MacGlashan – Conservator – Petitioner)

Age: 91	CRAIG MACGLASHAN, son, was	NEEDS/PROBLEMS/COMMENTS:
	appointed Conservator of the person	
	and of the estate on 05/17/2010.	Need Second Account or Petition
	Letters issued on 05/25/2010.	for Final Distribution.
Cont. from	M:	
Aff.Sub.Wit.	Minute Order of 10/25/2012 set this status hearing for the filing of the	
Verified	Second Account.	
Inventory	Status Bonort of Courselfor Crain	
PTC	Status Report of Counsel for Craig McGlashan, filed 07/10/2014 states	
Not.Cred.	conservatee passed away on	
Notice of	01/01/2014 at St. Agnes Medical Center	
Hrg	in Fresno, Ca. Conservator's first account covers the period beginning	
Aff.Mail	05/24/2010, and ending 05/30/2011.	
Aff.Pub.	Conservator is in the process of	
Sp.Ntc.	gathering documents to file the Final Accounting with the Court and	
Pers.Serv.	anticipates to have it filed by the end of	
Conf.	July 2014. Conservator has retained the	
Screen	services of this attorney for the	
Letters	conservatee's estate. It is anticipated that the Petition for Probate will be filed	
Duties/Supp	at the same time as the Final	
Objections	Accounting is filed with this Court.	
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		<b>Reviewed on:</b> 07/09/2014
UCCJEA		<b>Updates:</b> 07/10/2014
Citation		Recommendation:
FTB Notice		File 2 - McGlashan

## Atty Boyajian, Thomas M., sole practitioner (for Conservator Irene V. Santos)

## Status Hearing Re: Filing of the First Account

Age: 88 years	IRENE V. SANTOS, daughter, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Conservator of the Person and Estate on	
	11/8/2012 with bond set at \$123,895.00.	Continued from 4/4/2014.
	Order Appointing Probate Conservator was filed 12/4/2012.	<b>Note:</b> Petition to Reduce Amount
Cont. from	illeu <u>12/4/2012</u> .	of Bond was heard on 7/7/2014,
121313, 010314,	Minute Order dated 11/8/2012 from the	and continued to <u>8/7/2014</u> .
040414	hearing on the appointment of	<u> </u>
Aff.Sub.Wit.	Conservator set this Status Hearing on	Need first account of the
Verified	12/13/2013 for filing of the first account.	conservatorship estate, or
Inventory	Final Inventory and Appraisal filed 3/7/2013	verified Status Report and
PTC	shows an estate value of \$164,620.32	proof of service of notice of
Not.Cred.	consisting of cash (\$66,660.32) and real	the status hearing pursuant to
Notice of	property.	Local Rule 7.5(B).
Hrg		1000.1000.1000
Aff.Mail	Proof of Bond was filed 5/6/2013, and	
Aff.Pub.	Letters issued on <u>5/23/2013</u> .	
Sp.Ntc.	Pursuant to Probate Code § 2620(a), first	
Pers.Serv.	account was due on <u>12/4/2013</u> .	
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LEG
Status Rpt		Reviewed on: 7/9/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 3 – Murillo

## Notes for background:

- Court records show Attorney Joel Murillo represented the Conservator, until Substitution of Attorney was filed on 11/21/2013, indicating Attorney Thomas Boyajian represents the Conservator. Court records show that following the Order Appointing Probate Conservator filed 12/4/2012, no documents were filed in this matter, including proof of bond and Letters of conservatorship, until the status hearing for filing of the Inventory and Appraisal was held on 2/8/2013, at which time, as stated in Minute Order, the Court was informed by Attorney Murillo that \$62,874.00 in cash was being used to continue the estate forward and the real estate was in the process of being rented.
- Minute Order dated 12/13/2013 [Judge Hamilton] states: No appearances. Matter continued to 1/3/2014. The Court orders Thomas Boyajian to be personally present on 1/3/2014. The Court directs that a copy of the minute order be sent to Thomas Boyajian. Clerk's Certificate of Mailing filed 12/13/2013 shows the Minute Order dated 12/13/2013 was mailed to Thomas Boyajian on 12/13/2013.
- Order Confirming Sale of Real Property filed 2/25/2014 shows the estate real property was sold for \$116,000.00. Minute Order dated 2/25/2014 states sale is confirmed and no additional bond will be necessary under the circumstances.
- Status Report filed 3/28/2014 for the last status hearing (not current) states: The sales proceeds from the real property were distributed on 3/20/2014 to the Conservator; the Conservator has been paying bills, but she needs time to review the outstanding bills and pay the bills from the disbursed funds; upon completion of this task, she can commence the accounting aspect of this matter; the Conservator [requests] a continuance of 90 days from 4/1/2014 to be able to fulfill the accounting requirements; the proposed date is 7/7/2014.

Status Hearing Re: Filing of the First Account

	NEEDS/PROBLEMS/COMMENTS:
	OFF CALENDAR. Order Settling First and Final
Cont. from	Account signed 10/02/2013.
Aff.Sub.Wit.	Account signed 10/02/2010.
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: LV
Status Rpt	Reviewed on: 07/09/2014
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 4 – Cross

Michael Lynn Doolittle (Estate)

Hemb, Richard E. (for Amber Lynne White – Daughter – Executor)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

	D 0 15 10	AAARER LYAIME MUITE D	
DC	D: 2-15-13	AMBER LYNNE WHITE, Daughter, was	NEEDS/PROBLEMS/COMMENTS:
		appointed as Executor with Full IAEA	1 No. 16 and 11 and 12
		without bond on 5-13-13.	Need first account or petition
			for final distribution pursuant to
		At the hearing on 5-13-13, the Court set	Probate Code §12200 or
	Aff CL WILL	this status hearing for the filing of the	verified written status report
	Aff.Sub.Wit.	petition for final distribution pursuant to	pursuant to local rules.
	Verified	Probate Code §12200.	
	Inventory	I&A filed 9-4-13 indicates a total estate	
	PTC	value of \$585,750.00 consisting of	
	Not.Cred.	decedent's interest in various real	
	Notice of	property.	
	Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 7-8-14
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 5 - Doolittle

Becker, Adam D. (for Executor Angie Stuckey)
Status Hearing Re: Filing of the Inventory and Appraisal

	status nearing ke: riling of the inventory a	па Арргава
DOD: 1/28/10		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR
Cont. from		I&A filed 3-17-14, 4-16-14
030714, 041114		Order for final distribution was
Aff.Sub.Wit.		entered on 6-23-14.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order Aff Posting		Reviewed by: skc
Aff. Posting Status Rpt		Reviewed by: SRC
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 6 - Fries

Henry Kemph (Estate)

Krause Cota, Stephanie J. (for Administrator Dale Ewing)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 11-19-1		DALE EWING, Nephew, was appointed as Administrator with Full IAEA with bond of	NEEDS/PROBLEMS/COMMENTS:
Cont. 041114			
Cont. 041114		\$53,500.00 on 11-13-13.	Continued from 4-11-14
II C.ONT. U4 I I I 4			
		Bond was filed and Letters issued on 1-16-14.	1. Need Inventory and
1 255 2 1 105	<del>. T</del>		Appraisal or verified written
Aff.Sub.Wi	t.	On 11-13-13, the Court set this status hearing	status report per local rules.
Verified		for the filing of the Inventory and Appraisal	
Inventory		pursuant to Probate Code §8800.	
PTC		Status Report (unverified) filed by Attorney	
Not.Cred.		Krause on 4-9-14 states that ten (10) known	
Notice of		creditors were noticed on 2-14-14. The	
Hrg		personal representative is keeping the real	
Aff.Mail		property insured and property taxes paid.	
Aff.Pub.		The personal representative is preparing an	
Sp.Ntc.		inventory of the decedent's property and will thereafter be in a position to submit the	
Pers.Serv.		inventory and appraisal to the probate	
Conf.		referee.	
Screen			
Letters			
Duties/Sup	р		
Objection	s		
Video			
Receipt			
CI Report			
9202			
Order			
Aff. Postin	g		Reviewed by: skc
Status Rpt			Reviewed on: 7-8-14
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 7 – Kemph

Markeson, Thomas A. (for Kevin Gunner – Administrator with Will Annexed)
Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 10-29-13	KEVIN GUNNER was appointed as	NEEDS/PROBLEMS/COMMENTS:
	Administrator with Will Annexed with Full	
	IAEA with bond of \$384,000.00 on 2-11-14.	1. Need Inventory and
	Davadovan filadamal lakkamian alam	Appraisal or verified written
	Bond was filed and Letters issued on 2-24-14.	status report pursuant to local rules.
Aff.Sub.Wit.	22111	iocai ioics.
Verified	At the hearing on 2-11-14, the Court set	2. There have been numerous
Inventory	this status hearing for the filing of the	creditor's claims filed, and at
PTC	Inventory and Appraisal.	least one request for special notice. Notice may be
Not.Cred.		required to be served for
Notice of		further status hearings
Hrg		pursuant to Probate Code
Aff.Mail		§1252.
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 7-8-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 8 - Schofield
		0

Status Hearing Re: Filing of the Inventory and Appraisal

Age:	NEEDS/PROBLEMS/COMMENTS:
DOD:	
	OFF CALENDAR
Cont. from	I&A filed 6-5-14
Aff.Sub.Wit.	Petition for final distribution filed
Verified	6-26-14 is set for hearing on 7-31-14.
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: skc
Status Rpt	Reviewed on: 7-8-14
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 9 - Carr

Atty Helon, Marvin T

Status Hearing Re: Filing of the Inventory and Appraisal

Age:	NEEDS/PROBLEMS/COMMENTS:
DOD:	
	OFF CALENDAR
Cont. from	I&A filed 4-15-14
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: skc
Status Rpt	Reviewed on: 7-8-14
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 10 - Deeter